

# **GUI Client User Guide**



## **Statewide Equipment Fleet Equipment Management System**



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## GUI Client User Guide

This document provides information pertaining to the Appx Desktop Client (gui) and navigational aids. The keymap options provided identify the keyboard equivalents to most of the function and option keys represented by gui buttons, icons or other graphical representations.

### Icon Definitions

#### Appx Toolbar



The following icons, or combinations of them, will appear on each input image and menu (the ENTER and CANCEL icons are normally the only icons available on menus).

Be aware that Appx may disable certain icons when the associated action is not available. For example, if you are running an input function that only allows the display of record information, i.e., the user cannot add, change or delete records, then the Add, Change and Delete icons will be dimmed and not accessible to the user (clicking on the icon will have no effect).



ENTER



CANCEL



ADD MODE



CHANGE MODE



INQUIRE MODE



DELETE MODE



CONFIRM DELETE

## Input Image



These buttons, or a combination of them, will appear on each input image. If they are dimmed, the buttons are not available for selection.



HELP (click Help icon, then click on field or Option button for text)



ENTER



END

## General Information

### Logic Field

**Logic** answers the question *Yes* or *No* and is usually represented by a checkbox. Appx allows you to click the checkbox and toggle it to represent *Yes* or *No*.

A check mark ☒ means *Yes*.

A blank checkbox ☐ means *No*.

A question mark ☐ means that you do not know the answer yet (blank value, not Y and not N).

Some logic items require you to set the checkbox to *Yes* or *No*. Others may allow you to specify a question mark value. Also, logic fields may sometimes be seen as a single character field with values of *Y* or *N* to represent *Yes* and *No* respectively.

## Query Images

Users should be aware that the Query Record Select, Sort Select and Selection Expression images do not contain the buttons normally associated with input images. The user must either simply press the Enter key (or other keyboard equivalent of desired function) or use the icons provided by Appx, either in the top right-hand corner of the image or the icons provided in the Appx Tool bar (Enter and Cancel icons at top left-hand corner of the image).

Refer to the EMS User Guide Section III, *Running Reports*, for a detailed discussion of the Record Selection, Sort Order and Expression Selection screens associated with a Query process. Included in the discussion is a listing of the various relational operators (EQ, GE, etc.) and a brief description of their meaning. A more detailed discussion is provided for the two “regular expression” relations, RI and RS.

## Creating Reports

### Creating PDF Output

With Appx version 4.2, the user has the option to create a pdf format report. The pdf report can be saved to your local C drive (or other available drive) and then subsequently printed on a local printer (doesn't have to be a network printer). The user may also email the pdf report to one or more individuals. The email recipients can then print the pdf report on his/her printer and/or save it to his/her local C drive or other available shared drive.

**All printing of pdf documents is controlled from the Adobe Reader window, i.e., the Appx Print PDF image has no effect on printing of pdf documents.**

To create a pdf report, simply run any EMS report. When presented with the Disposition image:

- Change Format to PDF
- Select appropriate Form Id (typically PDF-60L132 for landscape printing)
- Press or Click Enter to continue

APPX - viper.dot.state.ak.us:8060

File Options Help

Disposition

Report Options

Display on Screen? ☒    Prt Hardcopy? ☐    Totals Only? ☐  
Print Query Options? ☐    Browsable? ☐    Format TEXT  
FTP Data File? ☐    Record Limit  
Report Subheading:

Printer/Queue Options

Printer SEFHQ    Print Mode SPOOL  
Form Id LANDSCAPE    Disposition SCRATCH  
Copies 1

<Enter>    End

KEH TST UMS TF Chg



The system will then display the report in an Adobe Reader window. The system also generates an image, *PDF Print on Screen Dialog*, informing the user that a separate Adobe Reader window has been opened containing the report file. However, this image is obstructed by the Adobe Read window.

APPX - viper.dot.state.ak.us:8060

File Options Help

PDF Print on Screen Dialog

The PDF Document that you requested to print on screen should now be visible in a separate viewer.

This dialog provides for job control and handling of the print file.

Disposition Selections

☒ Print on Screen? ☐ Print Hard Copy? ☐ Print Summary Only?

Record Limit  Format PDF

Printer ID SEFHQ SEF HQ HP5(Landscape) Rm318

Form ID PDF-60L132 Landscape Ltr 13.2 cpi 8 lpi

Print Mode SPOOL Print File Disposition SCRATCH

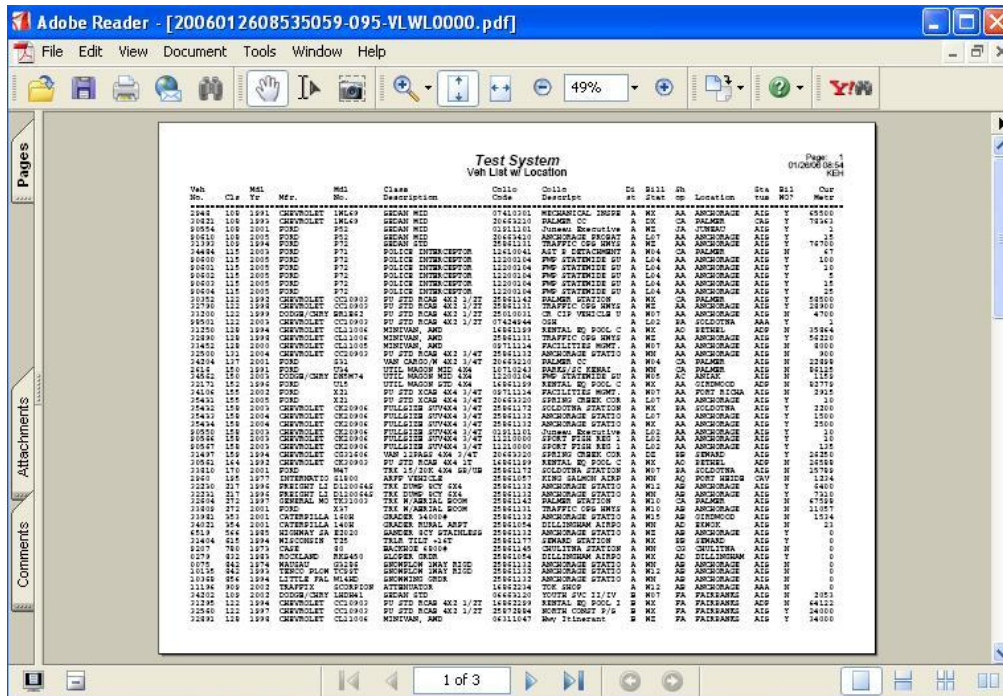
Priority  Print Spool Date/Time MM/DD/CCYY hh:mm


Number of Copies 1 ☐ Notify User When Done? ☐ Print Banner?

Print File Pathname /apps/appx/print/LVWL0000.pdf

Continue Cancel

KEH TST UMS TF Chg



The user can simply make the Adobe Reader window the active window(should occur by default) and perform the desired action: print the report, save it to disk, etc. Click *File* on the Title bar to view available options provided by Adobe Reader. After printing the file, email it, and/or save it to disk, simply press the  in the top right-hand corner of the Adobe Reader window, or select Exit or Close from the *File* option on the Title bar.

Then click on the Continue button on the Appx Print PDF image.

Note: *If you press the Cancel button on the Appx Print PDF image, regardless of action taken on the Adobe Reader window (and the Display On Screen and Prt Hadcopy settings on Appx Disposition screen), the print file will be retained in the print directory. Since you have no access to this directory, it is recommended you not select this option.*

## Creating Standard Output

The following discussion pertains to the creation of standard output documents, not pdf documents.

Once the report file is displayed on the screen, you will see the following Report Tool bar at the bottom of the screen. You will also see the standard Appx Tool bar options (Enter and Cancel) on the top of the screen. However, only the Cancel icon and the X on the top-right hand corner of the image have any effect.

The Report Tool bar provides the user with various navigational aids while displaying the report on-line.



Pan to Left Margin



Pan Screen Left 1 block



Pan Screen Left 1 character



Pan Screen Right 1 character



Pan Screen Right 1 block



Pan to Right Margin



Scroll to Top of Current Page



Scroll Up 1 block



Scroll Up 1 character



Scroll Down 1 character



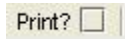
Scroll Down 1 block



Scroll to Bottom of Current Page



Search (allows user to enter page number or text string)<sup>1</sup>



Allows the user to toggle the Print? flag from Y to N.<sup>2</sup>



Close the Report Viewer (return to EMS menu and process report based on Disposition screen settings).

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<sup>1</sup> **Caution – currently if you click on the X of the Search dialog box, you will exit the report and it will print if the Hardcopy? is set to Y.**

<sup>2</sup> Backtick 4 will also toggle the Hardcopy? flag from Y to N

## Creating Excel Spreadsheet

EMS provides the opportunity to create tab-delimited ascii files (e-file) which can be ftp'd to a user's account on one of the DOT ftp servers. The user then logs into the ftp server, retrieves the e-file and saves it on his/her PC (or other action).

Use of the character-based system via telnet software requires the user submit a request to EMS support staff. The EMS support staff must then create the required account records in EMS, as well as request the creation of an ftp account for the user.

This e-file creation is currently limited to:

- Projected Agency FY Cost Report
- Projected Agency FY Rate Report
- Depreciation Report
- Fuel Consumption Report
- FTP Asset Data
- FTP MMS Data

However, this capability can be expanded to any other EMS report. Contact EMS support staff for more information.

With the advent of the desktop client (gui), the process is streamlined and gives the user much more flexibility. When executed via the gui client, there is no requirement for the user to have an ftp account on the ftp server, since the gui client does not utilize ftp software to make the e-file available to the user. It simply uses client-server technology to open up Microsoft Excel.

When running a report that is e-file enabled, the user must place a *Y* in the *FTP Data File* field on the Disposition screen. This can be accomplished by simply clicking on the box for that field. **If it is not set to Y, no e-file will be generated.**

When the report is run, the user will be presented with a dialog screen containing information regarding the creation of an e-file.<sup>3</sup> The user should make sure the specified temp directory exists before proceeding with the EMS report.


When presented with the report Disposition screen, check the *FTP Data File* box and press Enter to continue.

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<sup>3</sup> This is a temporary patch for a known bug in Appx software. The software is supposed to open up a standard dialog box asking the user to specify the destination location of the e-file, but does not work exactly as designed. If the user actually attempts to specify the file name to be used, the user's gui session is terminated without warning.

After the report is displayed, click the Close button on the report screen. The hardcopy report will print, if the Hardcopy flag is set to Y.

Regardless of the disposition of the hardcopy report, when the report screen is exited, the system will automatically run Excel and present the user with a spreadsheet containing the report data. The user can then simply exit Excel and the spreadsheet is saved in the directory location and file name specified in the initial e-file informational dialog. Alternately, the user may save the spreadsheet in another location by using the *File* option of the Excel Tool bar. The spreadsheet is always saved to the temp directory, regardless of the user saving the spreadsheet to another location.

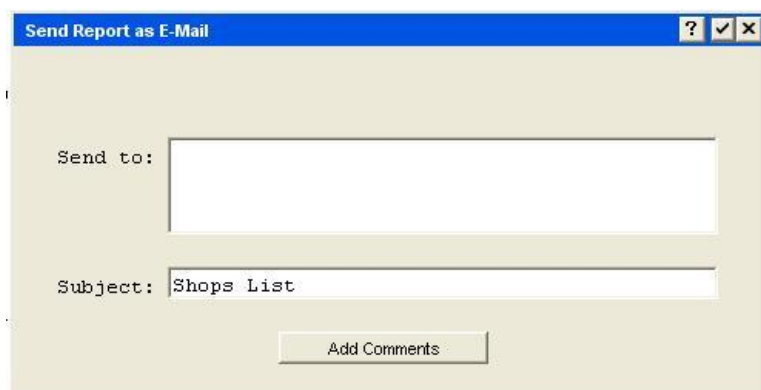
To exit, simply click the  button in the top right-hand corner of the Excel window or use the *File* option on the Excel Tool bar to exit.

## Sending a Report as E-Mail

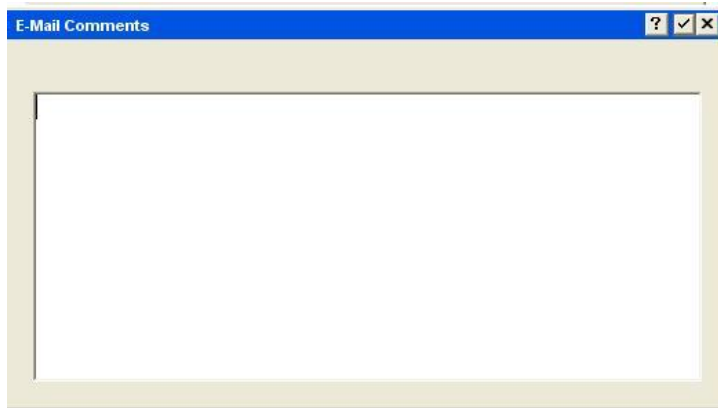
The following instructions are valid when running EMS from a telnet session (character-based session) or gui session. However, if running from a gui session, it is recommended you create pdf output and email the report via the Adobe Reader window rather than from Appx. If emailed from Appx (regardless of session method), when you print the report, you will print the email header information (Subject, From, Date, To) as well as any Comments you may have added at the beginning of the report.

When viewing a report on screen, you can elect to email it to another user. Be sure to select *Print on Screen?* on the Report Disposition screen, otherwise this feature will not be available to you. Select this field by simply clicking the box next to the field descriptor; a check mark ☒ will appear in the box.

After the report runs and is displayed on your screen, select **OPTION 7** (press the backtick key, then the number 7 KEY). The *Send Report as E-Mail* overlay, shown below, appears and you can define recipient and subject information. Be careful when entering email addresses, there are no edit/validation routines. It simply sends the report to the email addresses as entered.

A screenshot of a dialog box titled "Send Report as E-Mail". The dialog box has a blue title bar with a question mark, a checkmark, and a close button. The main area is light beige. It contains two text input fields: "Send to:" and "Subject:". The "Subject:" field contains the text "Shops List". Below the "Subject:" field is a button labeled "Add Comments".

You can add comments by selecting the **ADD COMMENTS** button. When selected, the *E-Mail Comments* overlay appears. Enter comments and select **ENTER** ☒ (check mark in top right-hand corner of the dialog box). You will now be returned to the *Send Report as E-Mail* overlay.



To email the report, select **ENTER** ☒ until the report display reappears. Note that this feature is only available on UNIX installations that function as, or interface to, a Mail Server.



## Customize Appx Desktop Client

The user has the ability to modify various settings and presentation style associated with the Appx Desktop Client (ADC). The ADC is a program that resides on your PC or notebook (laptop) computer. It is used to establish a graphical (point & click) user session with EMS.

Modifications to the ADC settings must be made prior to establishing a session with EMS. Once the ADC is running (you are in EMS), changes to the ADC settings have no effect. Changes to the ADC are made from the *Appx Client Login* dialog box; this is the window that is displayed when you run the ADC.



To make changes, simply click on the *Options* tab.



Two types of modifications are currently available: 1) GUI Look (Presentation Style) and 2) Advanced settings.

## Presentation Styles

The user can choose from the six available options; Appx is the default setting. Simply click on the desired style, then click on the *Remote* tab to complete the login process.


Some of the styles are very similar and it may be difficult to discern the differences. You will have to experiment and decide which style you like. Microsoft Windows settings may also affect the ADC presentation.

## Advances Options

To change other settings, click on the *Advanced* button in the *Options* tab. You will be presented with a number of settings that control the ADC. **It is highly recommended that you not modify most of these settings.**

The only setting you may wish to experiment with is the *Font Size* (located in *Startup* section) – increasing the size will enlarge the ADC window, decreasing the size will reduce the size of the ADC window.

To change the Font Size, either press Page Down and Page Up keys or click on the scroll bar located on the right-hand margin of the *Client Preferences* dialog. Continue to scroll until you locate the *Startup* section. Position the mouse pointer on the Value column of the Font Size field and double-click the left-mouse button. The field should be modifiable. Enter the desired value and press Enter key.

After you have completed your changes, click on the  located in the top right-hand corner of the *Client Preferences* dialog. Then click on the *Remote* tab to complete the login process.

## GUI Client Keymap

Function	Key or Key Combination
Field Help	F1
Option Help	Ctrl + F1
Scan	F2
Select Access Path	F3
Set Item Attributes	Ctrl + F3
Previous Image	F4
Next Record	F5
End	F8 or Esc or Ctrl + E
Cancel	Ctrl + F8 or Ctrl + Esc
Add Mode	F9
Delete Mode	F10
Confirm Delete	Ctrl + F10
Inquire Mode	F11
Change Mode	F12
Move To End of Item	End
Move to Begin of Item	Home
Show Messages	Ctrl + M
Page Up	Page Up
Page Down	Page Down
Scroll Rpt to First Page	Ctrl + Page Up
Scroll Rpt to Last Page	Ctrl + Page Down
Scroll Rpt Up 1 Line	Alt + Page Up
Scroll Rpt Down 1 Line	Alt + Page Down
Pan Rpt Left/Right 1 Cell	Shift + Arrow Key (← or →)
Pan Rpt Left/Right 1 Block	Ctrl + Arrow Key (← or →)

Function	Key or Key Combination
Pan Rpt to Left/Right Margin	Alt + Arrow Key (← or →)
Enter	Enter
Tab	Tab
Back Tab	Shift + Tab
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V